

## 5. Common Screen Features

### 5.1 Introduction

The screens developed for the Metrics application have certain characteristics that make them “look and feel” the same. Section 5 introduces you to some of the features that you will see and use repeatedly.

### 5.2 Screen Showing Menu Bar and Tool Bar

The PreAward Surveys screen shown in Figure 5.1 represents a “typical” Metrics screen. It shows the appearance and location of the tool bar and the menu bar. (Remember that before you can access any Metrics function screen, you must successfully open the application as explained in Section 1, log in as explained in Section 2, and then navigate to a function from the Menu screen as explained in Section 4.)

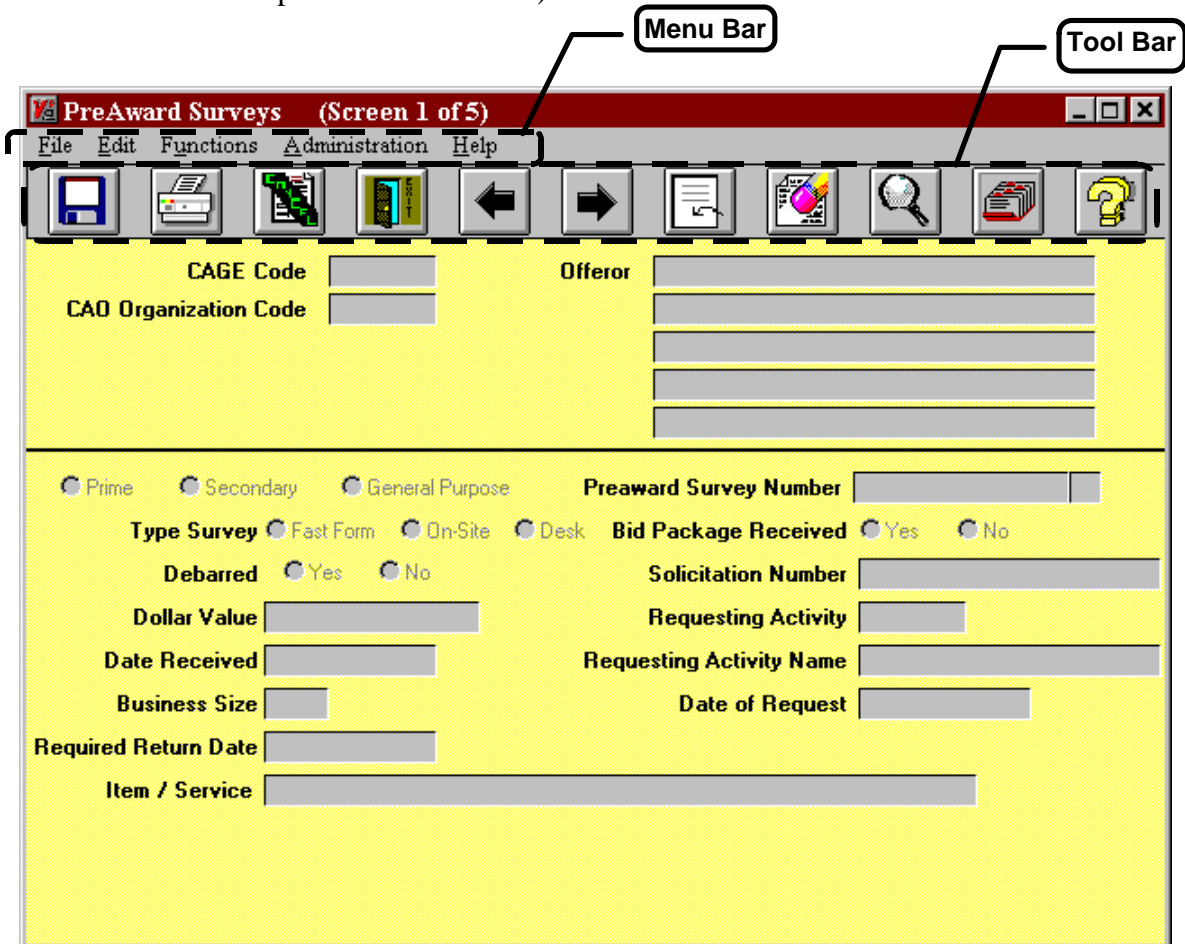


Figure 5.1 Screen Showing Location of Tool Bar and Menu Bar

### 5.3 Menu Bar

The menu bar is located at the top of a Windows application screen. It is a row of words with one letter underlined in each word. The words are referred to as menu bar items. The first two

items in the menu bar of many Windows applications are File and Edit. In the Metrics application, the remaining menu bar items are Functions, Administration and Help. (See Figure 5.1.)

Hidden behind each menu bar item on a function screen is a list of words called “options.” To see the list of options associated with any menu bar item, select that item. You can select an item on the menu bar using either your mouse or your keyboard.

Depending on the screen displayed on your monitor some options may be “grayed out.” This means that these items cannot be selected; that is, if you click on them, nothing happens.

To select an option from a displayed option list, you can use the mouse to click on the desired option or use your keyboard’s Alt and underlined letter keys. The following steps, used to exit the Metrics application, summarize the two-step procedure for using the menu bar to tell the computer to perform a specific action.

- First, select (mouse or keyboard method) the File option on the menu bar because Exit is a File option.
- Second, from the list of File options, select Exit (mouse or keyboard method).

The figures in the following sections (5.3.1 through 5.3.4) show the various command options under each menu bar item. Table 5.1 summarizes what happens if you select each File option while Table 5.2 summarizes what happens if you select each Edit option. ***Note: Some functions were developed for supervisory use only.***

### 5.3.1 File Options

If you select the File item on the menu bar, you will see the options shown in Figure 5.2. Table 5.1 tells you what happens when you select each File option.

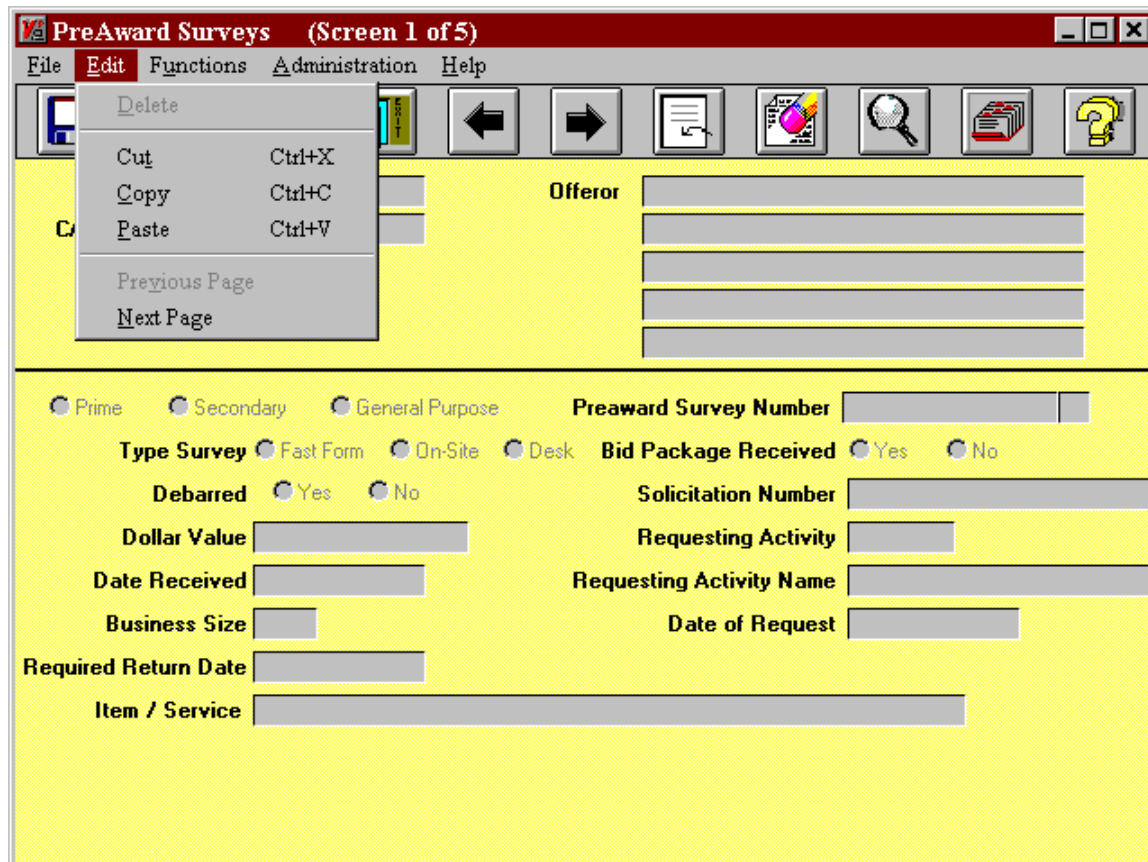
Figure 5.2 File Options

Table 5.1 File Options

File Option	Action Upon Selection
<u>N</u> ew	Add a new record to the database. See Section 6 for more information.
<u>O</u> pen	Find and display an existing record. See Section 6 for more information.
<u>S</u> ave	Saves your changes, additions, deletions into the database.
<u>P</u> rint Screen	Sends a “picture” of whatever is on the screen to the printer for a paper copy. The printer will be the one currently assigned as the default printer in Windows.
<u>C</u> ancel	Deletes the information you are currently entering from <b>all</b> screens and reverts back to the information entered from the last save. See Section 5.5 for more cautions on the Cancel option.
<u>E</u> xit	Sends you out of the application with a subsequent option of saving any changes you made before you exit. See Section 9.

### 5.3.2 Edit Options

The Edit options include commands that are used to make changes to Metrics information as explained in Table 5.2. Figure 5.3 shows the drop-down list of Edit options you see when you select the Edit item.



**Figure 5.3 Edit Options**

**Table 5.2 Edit Options**

Edit Option	Action Upon Selection
<u>D</u> elete	Remove a record from the database. Select delete when the record you want to delete is displayed. A pop-up window will ask you to confirm the deletion. Select Yes to delete. If you select No, your request will be canceled.
<u>C</u> ut	Same as copy, but also deletes the selected text after a copy is made. (See Appendix B.)
<u>C</u> opy	Makes a copy of selected text that can be added (pasted) elsewhere. (See Appendix B.)
<u>P</u> aste	Adds text which was previously copied or cut. (See Appendix B.)
<u>P</u> revious Page	Close the current screen and display the previous one.
<u>N</u> ext Page	Close the current screen and display the next one.

### 5.3.3 Functions Options

To use the Functions options, select Functions on the menu bar. Once you do this, you will see the list of available functions as shown in Figure 5.4. Then use your mouse or the keyboard to select the function of your choice. *Notes: Some functions were developed for supervisory use only. These functions are further explained in DCMC Metrics Administration Users Guide.*

You use the Metrics Menu screen to select your first data-entry screen. Once you have accessed any Metrics function, you can use the Functions options to navigate to any other function. (See Figure 5.4.)

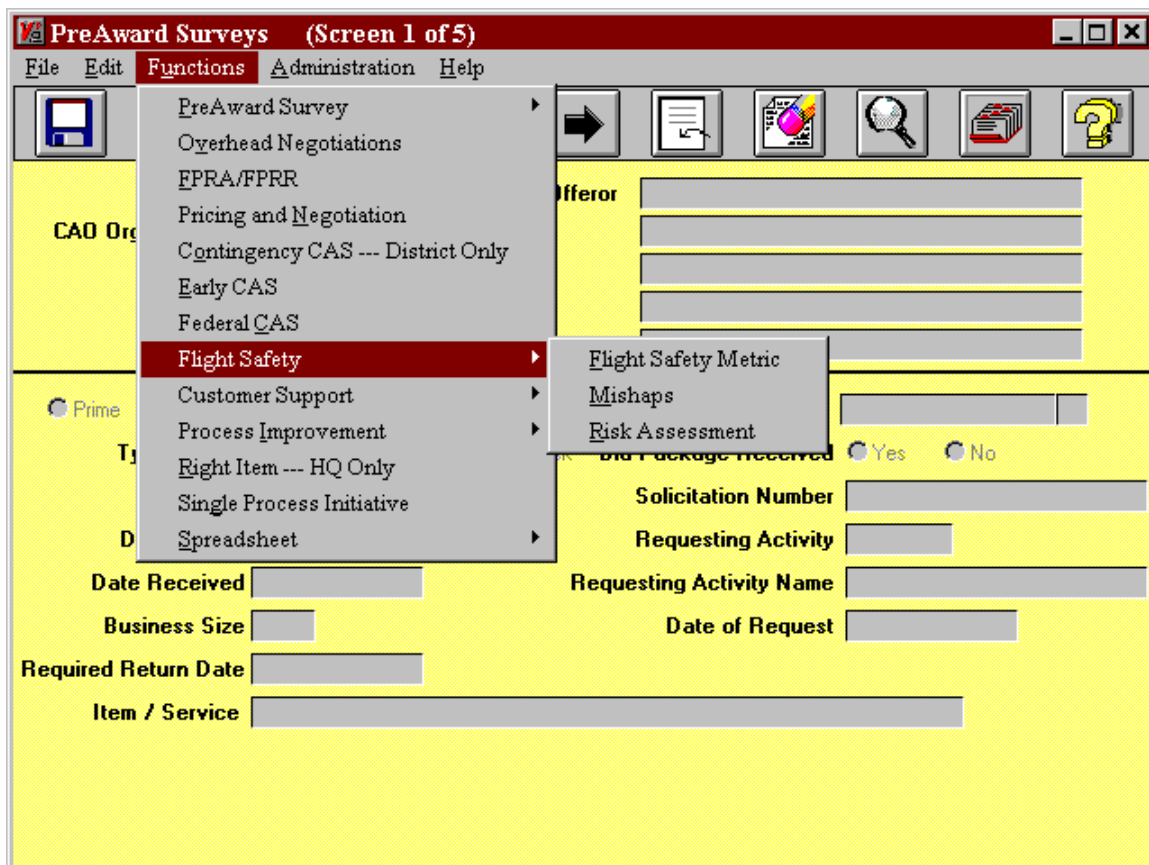


Figure 5.4 Functions Options



### 5.3.4 Administration Options

Depending on your role as determined by your position, you may or may not have access to the Administration options shown in Figure 5.5. Selecting Organization opens the screen needed to add, delete or change Organization information. Selecting User opens the screen needed to add, delete or change User information. Selecting Postcard Trailers Admin opens the screen needed to view, add, delete and change Postcard Trailer Codes and their associated Product descriptions. *Note: These options are further explained in DCMC Metrics Administration Users Guide.*

**PreAward Surveys (Screen 1 of 5)**

File Edit Functions **Administration** Help

Organizations  
Users  
Postcard Trailers Admin

CAGE Code: \_\_\_\_\_

CAO Organization Code: \_\_\_\_\_

Preaward Survey Number: \_\_\_\_\_

Type Survey: ☐ Prime ☐ Secondary ☐ General Purpose

Fast Form: ☐ On-Site: ☐ Desk: ☐

Bid Package Received: ☐ Yes ☐ No

Debarred: ☐ Yes ☐ No

Solicitation Number: \_\_\_\_\_

Dollar Value: \_\_\_\_\_

Requesting Activity: \_\_\_\_\_

Date Received: \_\_\_\_\_

Requesting Activity Name: \_\_\_\_\_

Business Size: \_\_\_\_\_

Date of Request: \_\_\_\_\_

Required Return Date: \_\_\_\_\_

Item / Service: \_\_\_\_\_

Figure 5.5 Administration Options

### 5.3.5 Help Options

This application provides you with extensive on-line help that is available from any function screen. This help reflects the content of this Users Guide and is available through the Help options on the menu bar. The options that appear when you select the Help item on the menu bar are shown in Figure 5.6.

The screenshot shows the 'PreAward Surveys (Screen 1 of 5)' window. The menu bar includes 'File', 'Edit', 'Functions', 'Administration', and 'Help'. The 'Help' menu is open, showing 'Contents F1' and 'About...'. The main window area is yellow and contains various input fields and radio buttons for survey data entry.

**Input Fields:**

- CAGE Code
- CAO Organization Code
- Offeror
- Preaward Survey Number
- Solicitation Number
- Requesting Activity
- Requesting Activity Name
- Date of Request
- Item / Service

**Radio Buttons:**

- Type Survey: ☐ Prime, ☐ Secondary, ☐ General Purpose
- Bid Package Received: ☐ Yes, ☐ No
- Debarred: ☐ Yes, ☐ No

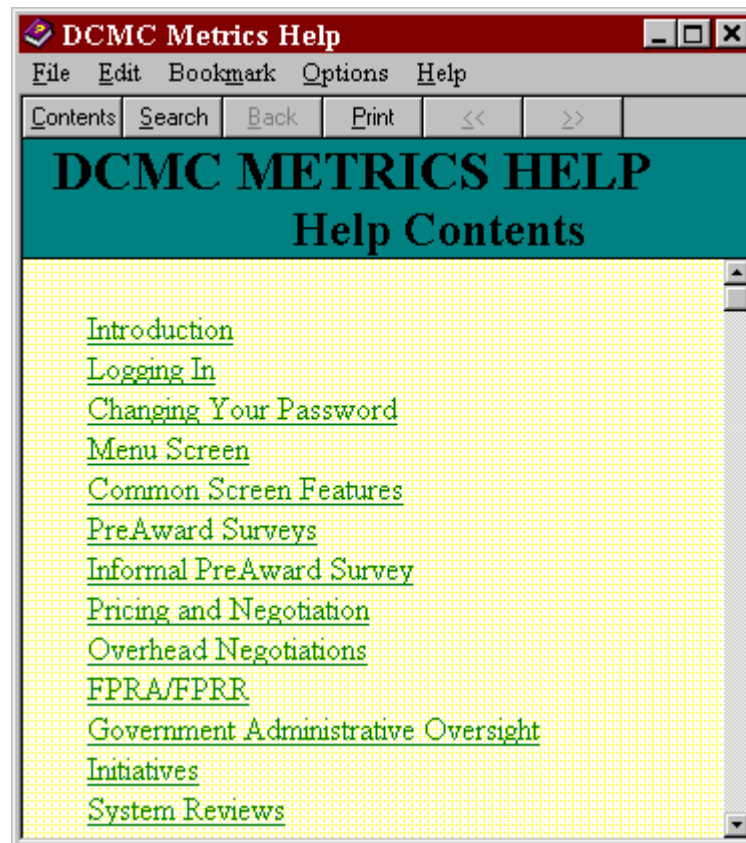
**Other Fields:**

- Fast Form
- On-Site
- Desk
- Dollar Value
- Date Received
- Business Size
- Required Return Date

Figure 5.6 Help Options

#### 5.3.5.1 Help Contents Option

Selecting the Contents option opens the Metrics on-line help facility which is like any other Windows application help facility. You can also access the Help facility from any function screen by clicking on the Help icon (Section 5.4) or by pressing the F1 key on your keyboard. If you have used Help in other Windows applications, you already know how to take advantage of this one. The Help Contents window is shown in Figure 5.7.



**Figure 5.7 DCMC Metrics Help Contents Screen**

You can use Help in a variety of ways. Three ways are listed below.

1. To view information about a particular listed topic, select that topic from the Contents screen.
2. To find out information about a particular word or words, select Search and then type in the word or words that you want to find.
3. Select the word Print from the Help screen tool bar or the Print Topic option from the drop-down list of File options to print out any displayed information.

If you have not already done so, try it out. Click on a topic. Search for a word. See what happens. To close the Help facility, first select File, and then select Exit.

#### **5.3.5.2 Help About Option**

If you want to know what version of the Metrics application you are using, select the About option. A screen will pop up on top of your open screen with the version information. To close the About window, click **OK**. To exit the Help facility, select Exit from the list of File options.












### **5.4 Tool Bar**

The tool bar is located immediately below the menu bar. (See Figure 5.1.) It consists of a row of icons. Icons are little pictures that you use to tell the computer what to do. You use an icon



by clicking on it. Clicking on an icon means using the mouse to position the pointer on the icon you want to select, and then pressing and releasing the left mouse button one time. Table 5.3 explains the function of each icon in the tool bar.

**Table 5.3 Functions of Tool Bar Icons**

Icon	Command	Action Upon Selection
	Save	Saves your changes, additions, deletions into the database.
	Print Screen	Sends a “picture” of whatever is on the screen to the printer for a paper copy. The printer will be the one currently assigned as the default printer in Windows.
	Cancel	Deletes the information you are currently entering from <b>all</b> screens and reverts back to the information entered from the last save. See Section 5.5 for more cautions on the Cancel option.
	Exit	Sends you out of the application with a subsequent option of saving any changes you made before you exit. See Section 9.
	Previous Page	Close the current screen and display the previous one. If there is no previous page, this option is “grayed out” meaning not available.
	Next Page	Close the current screen and display the next one. If there is no next page, this option is “grayed out” meaning not available.
	New	Add a new record to the database. See Section 6 for more information.
	Delete	Remove a record from the database. Select delete when the record you want to delete is displayed. A pop-up window will ask you to confirm the deletion. Select Yes to delete. If you select No, your request will be canceled.
	Open	Find and display an existing record. See Section 6 for more information.
	Menu	Displays the main Menu screen on your monitor.
	Help	Opens the Metrics application Help facility.

### 5.5 Cancel Option Cautions



If you select Cancel, you will eliminate all additions/changes you made to the record displayed from all screens—not just the current screen. The system will revert back to

the record as it existed before you made changes and selected Cancel. This means that if you adding a new record, no part of it will be saved if you select Cancel because no part of it existed before you started to add it.

Or let's say you are changing and adding information to an existing record. Furthermore, let's say you are on screen 5 of 6 after making numerous changes on screens 1—4. You then decide that you made a mistake in one of your changes, so you select Cancel. What happens? First, you successfully cancelled (removed) the change with the mistake. Second, you also cancelled (removed) all the other changes you made on screens 1—5. In order to recreate the changes you need, you must again display and edit the record.

So when might you want to use cancel? Perhaps you were adding a new record and then realize (via pop-up messages) that you do not have all the information you need to save the record. Selecting Cancel removes what you added, and since there was no prior information, there is no record. You can enter the record later when you have all of the information required to enter and save the record. *Note: Cancel removes your current changes from all screens whereas delete erases an entire record from the database.*

## 5.6 Automatically Populated Data

Some data boxes may be automatically populated this means that the system application “tells” your computer to put specific information in certain data boxes. The information may be:

1. Information associated with your Username entered during the Log-in procedure.
2. Information associated with information you entered in another data box.
3. The system (or current) date.
4. A number generated by your computer as being the next sequential number.
5. A value calculated by your computer.

Most automatically populated boxes are protected; that is, you cannot change (or even select) the information displayed in them. However, some can be edited as you would in any other data box.

## 5.7 Required Data

Some data boxes on a given screen may be mandatory; that is, you must enter the requested information before you can save and exit. These are said to be **required data elements**. In some cases, you cannot even move on to another data box until you enter the requested information. If you move off a required data box or try to exit without first entering the information, you will see a message window pop up on your monitor like the one shown in Figure 5.8. To get rid of the pop-up message, click **OK**. Then add the missing information or exit the screen without saving. *Note: Some data elements are conditionally required, and so may be "grayed out" (unselectable).*



Figure 5.8 Sample Required Informational Missing Pop-Up Window

## 5.8 Optional Data

Data elements that are not mandatory are *optional*. You can enter information for the optional elements or not, depending on what information you have available to enter.

## 5.9 Conditionally Required Data

Some data elements are conditionally required. This means that in one situation, they may be required while in another they may not. For example, a choice you make between Yes and No for one data element may determine whether or not another data element is required or optional.

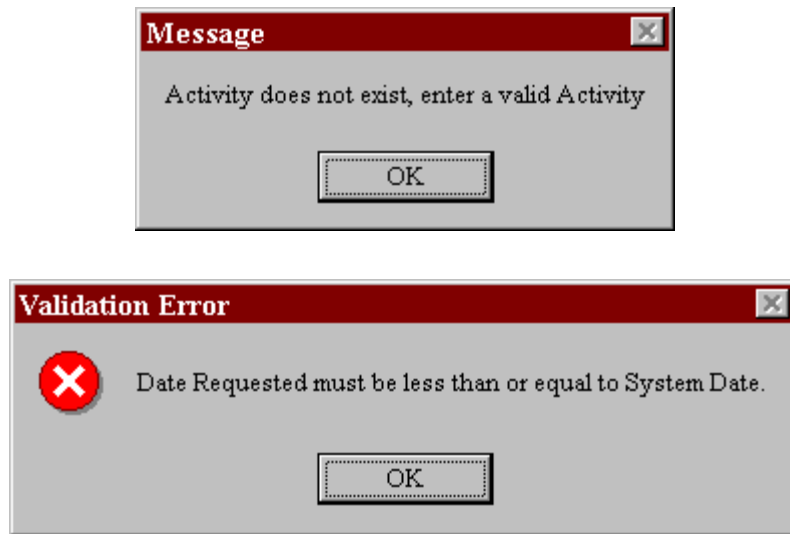
Also, for some Metrics functions there is a difference between what elements are required prior to Closing a record and what elements are required in order to close the record. Thus, when you signal the computer that you are ready to close a record (as by clicking on a **Close** button or entering a final date for a record), the application checks to see that you have entered all information required to close the record before it allows you to close and save.

## 5.10 Protected/Unselectable Data

Some data boxes are *protected*. In some cases this means that the application will not allow you to edit, or select, the information that appears in them. In other cases, this means that only certain users can enter or edit information. In some instances, depending on what information you enter, the application “decides” what data elements or screens you can access; that is, what you enter one place determines what information you can enter elsewhere. Data boxes that appear on your screen, but do not allow you to enter data are “grayed out.” You cannot place the cursor in or make a selection from such areas.

## 5.11 Validated Data

Sometimes when you enter information in one data box, the application “tells” your computer to enter associated information in other data boxes. Where such a relationship exists between what you enter and what appears, the information you enter must match a record already stored in the database. If it does not, you will see a message like one of those shown in Figure 5.9 appear on your monitor. Take note of what it says, and then click on **OK**. The message window disappears, and you can recheck/reenter the information.



**Figure 5.9 Validation Error Message**